

## UNITED STATES HOUSE OF REPRESENTATIVES

FORM B  
For New Members, Candidates, and New EmployeesOFFICE OF THE CLERK  
LEGISLATIVE RESOURCE CENTER  
U.S. HOUSE OF REPRESENTATIVES

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Page 1 of 8  
3

Name: <u>Stephen Marks</u>		Daytime Telephone: _____
FILER STATUS	New Member of or Candidate for U.S. House of Representatives	State: <u>Florida</u>
	Candidates – Date of Election:	District: <u>24</u> Date: <u>8/28/2018</u>
		<input type="checkbox"/> Check if Amendment
New Officer or Employee		Staff Filer Type (If Applicable): <input type="checkbox"/> Shared <input type="checkbox"/> Principal Assistant
Employing Office: _____		Period Covered: January 1, 2013 to _____

*U* (Office Use Only)  
 A \$200 penalty shall be assessed against any individual who files more than 30 days late.

## PRELIMINARY INFORMATION – ANSWER EACH OF THESE QUESTIONS

A. Did you, your spouse, or your dependent child:	
a. Own any reportable asset that was worth more than \$1,000 at the end of the reporting period? <input checked="" type="checkbox"/>	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
b. Receive more than \$200 in unearned income from any reportable asset during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
C. Did you or your spouse have "earned" income (e.g., salaries, honoraria, or pension/IRA distributions) of \$200 or more during the reporting period?	
Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>
D. Did you, your spouse, or your dependent child have any reportable liability (more than \$10,000) at any point during the reporting period?	
Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
E. Did you hold any reportable positions during the reporting period or in the current calendar year up through the date of filing? <input type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	
F. Did you have any reportable agreement or arrangement with an outside entity during the reporting period or in the current calendar year up through the date of filing? <input type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	
G. Did you receive compensation of more than \$5,000 from a single source in the current year and two prior years? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	

**ATTACH THE CORRESPONDING SCHEDULE IF YOU ANSWER "YES"**  
**THIS FORM INCLUDES ONLY THE SCHEDULES THAT YOU ARE REQUIRED TO COMPLETE**

## EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION - ANSWER BOTH OF THESE QUESTIONS

**TRUSTS** – Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "exempted trusts" need not be disclosed. Have you excluded from this report details of such a trust that benefits you, your spouse, or dependent child?  Yes  No

**EXEMPTION** – Have you excluded from this report any other assets, "unearned" income, or liabilities of a spouse or dependent child because they meet all three tests for exemption? Do not answer "yes" unless you have first consulted with the Committee on Ethics.  Yes  No

## SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name: Stephanie Masters

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BLOCK A												BLOCK B												BLOCK C												BLOCK D											
Assets and/or Income Sources												Value of Asset												Type of Income												Amount of Income											
<p>Identify (a) each asset held for investment, or production of income and with a fair market value, exceeding \$1,000 at the end of the reporting period, and (b) any other reportable asset or source of income which generated more than \$200 in "unrelated" income during the year.</p> <p>Provide complete names of stocks and mutual funds (do not use only ticker symbols).</p>																																															
<p>For all IRAs and other retirement plans (such as 401(k) plans) provide the value for each asset held in the account that exceeds the reporting threshold.</p> <p>For bank and other cash accounts, total the amount in all interest-bearing accounts. If the total is over \$5,000, list every financial institution where there is more than \$1,000 in interest-bearing accounts.</p> <p>For rental and other real property held for investment, provide a complete address or description, e.g., "Rental property," and a city and state.</p> <p>For an ownership interest in a privately-held business that is not publicly traded, state the name of the business, the nature of its activities, and its geographic location in Block A.</p> <p>Exclude: Your personal residence, including second homes; and vacation homes (unless there was rental income during the reporting period); and any financial interest in, or income derived from, a federal retirement program, including the Thrift Savings Plan.</p> <p>If you report a privately-traded fund that is an Excepted Investment Fund, please check the EIF box.</p> <p>For a detailed discussion of Schedule A requirements, please refer to the instruction booklet.</p>																								<p>Indicate value of asset at close of the reporting period. If you use a valuation method other than fair market value, please specify the method used.</p> <p>If an asset was sold during the reporting period and is included only because it generated income, the value should be "None."</p> <p>"Column M is for assets held by your spouse or dependent child in which you have no interest.</p>												<p>Check all columns that apply. For accounts that generate tax-deferred income (such as assets held in the "Tax-Deferred" column), you may check the "None" column.</p> <p>Check "None" if no income was earned or generated.</p> <p>For assets held in taxable accounts, check "None" if the asset generated no income during the reporting period.</p>											
<p>None</p> <p>\$1-\$1,000</p> <p>\$1,001-\$15,000</p> <p>\$15,001-\$50,000</p> <p>\$50,001-\$100,000</p> <p>\$100,001-\$250,000</p> <p>\$250,001-\$500,000</p> <p>\$500,001-\$1,000,000</p> <p>\$1,000,001-\$5,000,000</p> <p>\$5,000,001-\$25,000,000</p> <p>\$25,000,001-\$50,000,000</p> <p>Over \$50,000,000</p> <p>Spouse/DC Asset over \$1,000,000*</p>												<p>A    B    C    D    E    F    G    H    I    J    K    L    M</p>												<p>I    II    III    IV    V    VI    VII    IX    X    XI    XII</p>												<p>I    II    III    IV    V    VI    VII    IX    X    XI    XII</p>											
<p>NONE</p> <p>DIVIDENDS</p> <p>RENT</p> <p>INTEREST</p> <p>CAPITAL GAINS</p> <p>EXCEPTED/BLIND TRUST</p> <p>TAX-DEFERRED</p>																																															
<p>Other Type of Income (Specify, e.g., Partnership Income or Farm Income)</p>																																															
<p>None</p> <p>\$1-\$200</p> <p>\$201-\$1,000</p> <p>\$1,001-\$2,500</p> <p>\$2,501-\$5,000</p> <p>\$5,001-\$15,000</p> <p>\$15,001-\$50,000</p> <p>\$50,001-\$100,000</p> <p>\$100,001-\$1,000,000</p> <p>\$1,000,001-\$5,000,000</p> <p>Over \$5,000,000</p> <p>Spouse/DC Income over \$1,000,000*</p>												<p>I    II    III    IV    V    VI    VII    IX    X    XI    XII</p>												<p>I    II    III    IV    V    VI    VII    IX    X    XI    XII</p>												<p>I    II    III    IV    V    VI    VII    IX    X    XI    XII</p>											
<p>None</p> <p>\$1-\$200</p> <p>\$201-\$1,000</p> <p>\$1,001-\$2,500</p> <p>\$2,501-\$5,000</p> <p>\$5,001-\$15,000</p> <p>\$15,001-\$50,000</p> <p>\$50,001-\$100,000</p> <p>\$100,001-\$1,000,000</p> <p>\$1,000,001-\$5,000,000</p> <p>Over \$5,000,000</p> <p>Spouse/DC Income over \$1,000,000*</p>												<p>I    II    III    IV    V    VI    VII    IX    X    XI    XII</p>												<p>I    II    III    IV    V    VI    VII    IX    X    XI    XII</p>												<p>I    II    III    IV    V    VI    VII    IX    X    XI    XII</p>											
<p>None</p> <p>\$1-\$200</p> <p>\$201-\$1,000</p> <p>\$1,001-\$2,500</p> <p>\$2,501-\$5,000</p> <p>\$5,001-\$15,000</p> <p>\$15,001-\$50,000</p> <p>\$50,001-\$100,000</p> <p>\$100,001-\$1,000,000</p> <p>\$1,000,001-\$5,000,000</p> <p>Over \$5,000,000</p> <p>Spouse/DC Income over \$1,000,000*</p>												<p>I    II    III    IV    V    VI    VII    IX    X    XI    XII</p>												<p>I    II    III    IV    V    VI    VII    IX    X    XI    XII</p>												<p>I    II    III    IV    V    VI    VII    IX    X    XI    XII</p>											

*Use additional sheets if more space is required*

## SCHEDULE A – ASSETS & “UNEARNED INCOME”

Name: Stephen Markis

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Use additional sheets if more space is required.

**SCHEDULE C – EARNED INCOME**

Name: Stephen Markis

Page 7 of 8

List the source, type, and amount of earned income from any source (other than the filer's current employment by the U.S. government) totaling \$200 or more during the reporting period. For both the filer and filer's spouse, list the source and amount of any honoraria. List only the source for other spouse earned income exceeding \$1,000. See examples below.

**EXCLUDE:** Military pay (such as National Guard or Reserve pay), federal retirement programs, and benefits received under the Social Security Act.

**INCOME LIMITS and PROHIBITED INCOME:** Be advised that the income limit and prohibited income may apply to you after you are on House payroll. The 2017 limit on outside earned income for Members and employees compensated at or above the "senior staff" rate was \$27,765. The 2018 limit is \$28,050. In addition, certain types of income (notably honoraria, director's fees, and payments for professional services involving a fiduciary relationship) are totally prohibited for Members and senior staff.

Source (include date of receipt for honoraria)	Type	Amount	
		Current Year to Filing	Preceding Year
ABC Trade Association, Baltimore, MD (July 15)	Honorarium	\$500	\$500
State of Maryland	Salary	\$20,000	\$76,000
Civil War Roundtable (Oct. 2)	Speaker Speech	\$0	\$1,000
Ontario County Board of Education	Spouse Salary	N/A	N/A

Use additional sheets if more space is required.

## SCHEDULE D - LIABILITIES

Name: Stephen Marko

Page 5 of 8

Report liabilities of over \$10,000 owed to any one creditor at any time during the reporting period by you, your spouse, or your dependent child. Mark the highest amount owed during the reporting period. **New Members:** Members are required to report all liabilities secured by real property including mortgages on their personal residence. **Exclude:** Any mortgage on your personal residence (unless you rent it out or are a Member); loans secured by automobiles, household furniture, or appliances; liabilities of a business in which you own an interest (unless you are personally liable); and liabilities owed to you by a spouse or the child, parent, or sibling of you or your spouse. Report a revolving charge account (i.e., credit card) only if the balance at the close of the reporting period exceeded \$10,000. \*Column K is for liabilities held solely by your spouse or dependent child.

## SCHEDULE E – POSITIONS

Report all positions, compensated or uncompensated, as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or other business enterprise, nonprofit organization, labor organization, or educational or other institution other than the United States. **Exclude:** Positions held in any religious, social, fraternal, or political entities (such as political parties and campaign organizations); and positions solely of an honorary nature. **New Members and second-year candidates** report positions held in the reporting period and the current calendar year. **First-year candidates and new employees** report positions held in the current calendar year and two previous years.

Position	Name of Organization

Use additional sheets if more space is required.

## SCHEDULE F – AGREEMENTS

Name: \_\_\_\_\_

Stephen Makris

Page 6 of 8

Identify the date, parties to, and general terms of any agreement or arrangement that you have with respect to: future employment; a leave of absence during the period of government service; continuation or deferral of payments by a former or current employer other than the U.S. government; or continuing participation in an employee welfare or benefit plan maintained by a former employer.

Date	Parties to Agreement	Terms of Agreement

**SCHEDULE J – COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE**

Report sources of compensation received by you or your business affiliation for services provided directly by you during the current year and two prior years. This includes the names of clients and customers of any corporation, firm, partnership, or other business enterprise if you directly provided the services generating a fee or payment of more than \$5,000. Exclude: Payments by the U.S. government and any information considered confidential as a result of a privileged relationship recognized by law. Do not repeat information listed on Schedule C.

Example:	Source (Name and City/State)	Brief Description of Duties
	Doe Jones & Smith, Hometown, Homestate	Accounting Services

*Use additional sheets if more space is required.*

LOAN: See next page for account  
Loans made to my account

**FILER NOTES  
(Optional)**

Name: Stephen Marko

Page 7 of 8

NOTE NUMBER	NOTES
1	Personal loan by myself of \$200,000 to my companion 4/20/18
2	Personal loan by myself of \$250,000 to my companion 7/20/18

*Use additional sheets if more space is required.*

**FILER NOTES  
(Optional)**

Name: Stephens Markets Page 8 of 2

*Use additional sheets if more space is required.*

THIS INSTRUMENT PREPARED BY AND  
IS TO BE RECORDED AND RETURNED TO:

LAWRENCE E. BLACKE, ESQ.  
3326 North East 33rd Street  
Fort Lauderdale, Florida 33308-7110  
(954) 566-5070

Property Appraisers Parcel I.D. (Folio Number): 4941 05 BF 0040

**TRUSTEES' DEED**  
(Testate)

THIS INDENTURE Made the 18<sup>th</sup> day of MAY, 2018, by and between LAWRENCE BRUCE MARKS whose address is 113 Muir Lane, Chapel Hill, NC 27514 and STEPHEN MARKS whose address is 9587 Weldon Circle, Unit #104, Tamarac, FL 33321, as Successor Co-Trustees of the Hyman and Helen Marks Revocable Trust Dated October 15, 2016 and LAWRENCE BRUCE MARKS, Individually, first parties, to STEPHEN MARKS, a single man, whose address is 9587 Weldon Circle, Unit #104, Tamarac, FL 33321, second party.

WITNESSETH: That the said first parties, for and in consideration of the sum of \$10.00 in hand paid by the said second party, the receipt whereof is hereby acknowledged, do hereby remise, release and quit-claim unto the said second party forever, any and all rights, title and interest, claims and demands which the said first parties have in and to the following described lots, pieces or parcels of land, all situate, lying and being in the County of Broward, State of Florida, to-wit:

Unit 104, of WELDON CONDOMINIUM B., according to the Declaration of Condominium thereof, as recorded in Official Records Book 24071, Page 433, and any amendments thereto, of the Public Records of Broward County Florida.

Also known as: 9587 Weldon Circle, Unit #104, Tamarac, FL 33321

TOGETHER with all the tenements, hereditaments and appurtenances thereto belonging or in anywise appertaining.

To have and to hold the same together with all and singular the appurtenances thereto belonging or in anywise appertaining, and all the estate, right, title, interest, lien, equity and claim whatsoever of the said first party, either in law or equity, or the only proper use, benefit and behoof of the said second party forever.

IN WITNESS WHEREOF, the said first parties have signed and sealed these presents the day and year first above written.

Signed, sealed and delivered in our presence:

WITNESSES:

Print Name: REBECCA A. MOORE

*Lawrence Bruce Marks* (I.S.)  
LAWRENCE BRUCE MARKS, Individually and  
as Successor Co-Trustee  
113 Muir Lane  
Chapel Hill, NC 27514

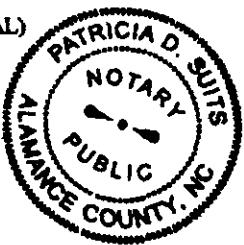
Print Name: Dana R. Bell

STATE OF NORTH CAROLINA )  
COUNTY OF Orange )

I HEREBY CERTIFY that on this day, before me, an officer duly authorized to take acknowledgments, personally appeared LAWRENCE BRUCE MARKS, Individually and as Successor Co-Trustee, to me known to be the persons described in and who executed the foregoing instrument and he acknowledged before me, under oath, that he executed the same.

WITNESS my hand and official seal in the County and State last aforesaid this 18<sup>th</sup> day of May, 2018.

(SEAL)



Notary Public - STATE OF NORTH CAROLINA  
Print Name: Patricia D. Swits

Print Name: Patricia D. Swits

My commission expires: May 25, 2022

Signed, sealed and delivered in our presence:

WITNESSES:

Carolyn Seckinger  
Print Name: Carolyn Seckinger

Susan Dyer  
Print Name: SUSAN DYER

Stephen Marks (U.S.)  
STEPHEN MARKS, Successor Co-Trustee  
9587 Weldon Circle, #104  
Tamarac, FL 33321

STATE OF FLORIDA  
COUNTY OF Broward)

I HEREBY CERTIFY that on this day, before me, an officer duly authorized to take acknowledgments, personally appeared STEPHEN MARKS, as Successor Co-Trustee, to me known to be the persons described in and who executed the foregoing instrument and he acknowledged before me, under oath, that he executed the same.

WITNESS my hand and official seal in the County and State last aforesaid this 17<sup>th</sup> day of  
May, 2018.

(SEAL)

Notary Public - STATE OF FLORIDA

Print  
SUSAN R DYER

Name:



WELLS  
FARGO

ADVISORS

**SNAPSHOT**  
**Current period ending June 30, 2018**

ACCOUNT NAME:

STEPHEN MARKS BENE IRA  
HYMAN MARKS (DECD)  
WFCS AS CUSTODIAN

ACCOUNT NUMBER:

Your Financial Advisor:  
RICHMAN GROSS  
Phone: 917-351-2000 / 800-223-0610

ONE PENN PLAZA  
27TH FLOOR  
NEW YORK NY 10119

If you have more than one account with us, why not link them and receive summary information for your entire household? Contact Your Financial Advisor for more details.

**Message from Wells Fargo Advisors**

DID YOU KNOW YOU CAN RECEIVE YOUR TRADE CONFIRMATIONS AND TAX INFORMATION ONLINE? PLEASE CONTACT YOUR FINANCIAL ADVISOR FOR MORE INFORMATION AND THE STEPS YOU CAN TAKE TO HELP MAKE THIS HAPPEN.

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Investments and insurance products are:

NOT FDIC-INSURED    NO BANK GUARANTEE    MAY LOSE VALUE

SNAPSHOT  
00154 5417

## SNAPSHOT

STEPHEN MARKS BENE IRA  
HYMAN MARKS (DEC'D)  
WFCS AS CUSTODIAN

JUNE 1, 2018 - JUNE 30, 2018  
ACCOUNT NUMBER: [REDACTED]

### Progress summary

	THIS PERIOD	THIS YEAR
<b>Opening value</b>	<b>\$55,581.29</b>	<b>\$69,234.08</b>
Cash deposited	0.00	10.85
Securities deposited	0.00	0.00
Cash withdrawn	0.00	-13,002.41
Securities withdrawn	0.00	0.00
Change in value	207.63	-453.60
<b>Closing value</b>	<b>\$55,788.92</b>	<b>\$55,788.92</b>

As a Wells Fargo Advisors client, you can upgrade your investment account to add Brokerage Cash Services at no additional cost. Brokerage Cash Services provides access to convenient money movement options including mobile deposit services. It also includes teller deposit services at Wells Fargo branch locations which are provided through a limited purpose Bank account. You'll have access to many more features and benefits to help you manage your finances. It's as simple as talking with Your Financial Advisor. Ask them today about Brokerage Cash Services.

### Portfolio summary

ASSET TYPE	PREVIOUS VALUE ON MAY 31		CURRENT VALUE ON JUN 30		ESTIMATED ANN. INCOME
	%		%		
<b>ASSETS</b>					
Cash and sweep balances	286.92	0.52	406.65	0.73	1
Stocks, options & ETFs	0.00	0.00	0.00	0.00	0
Fixed income securities	22,781.69	40.99	22,781.31	40.83	376
Mutual funds	32,512.68	58.50	32,600.96	58.44	929
<b>Asset value</b>	<b>\$55,581.29</b>	<b>100%</b>	<b>\$55,788.92</b>	<b>100%</b>	<b>\$1,306</b>

WELLS  
FARGO

ADVISORS

**SNAPSHOT**  
**Current period ending June 30, 2018**

ACCOUNT NAME: STEPHEN MARKS

ACCOUNT NUMBER: [REDACTED]

Your Financial Advisor:  
RICHMAN GROSS  
Phone: 917-351-2000 / 800-223-0610  
ONE PENN PLAZA  
27TH FLOOR  
NEW YORK NY 10119

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**News**

GET MORE DONE IN LESS TIME WITH WELLS FARGO MOBILE DEPOSIT. DEPOSIT CHECKS INTO YOUR BROKERAGE ACCOUNT WITH CASH SERVICES USING THE WELLS FARGO MOBILE APP ON YOUR MOBILE DEVICE. IT'S FAST, EASY, AND SECURE.

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**NO BANK GUARANTEE**

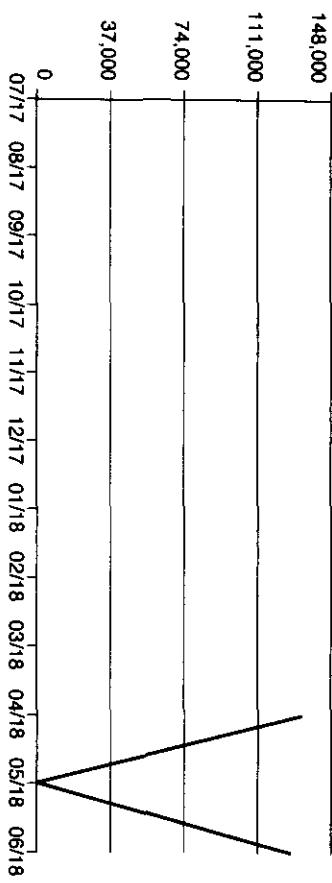
**MAY LOSE VALUE**

JUNE 1, 2018 - JUNE 30, 2018  
ACCOUNT NUMBER: [REDACTED]

**Progress summary**

	THIS PERIOD	THIS YEAR
<b>Opening value</b>	<b>\$29.19</b>	<b>\$0.00</b>
Cash deposited	127,766.58	355,575.01
Securities deposited	0.00	304,969.50
Cash withdrawn	-37.03	-532,843.42
Securities withdrawn	0.00	0.00
Change in value	-21.91	35.74
<b>Closing value</b>	<b>\$127,736.83</b>	<b>\$127,736.83</b>

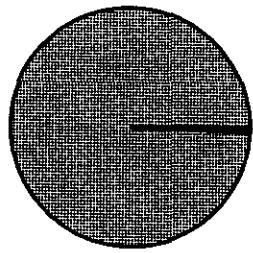
**Value over time**



**Portfolio summary**

CURRENT	ASSET TYPE	PREVIOUS		CURRENT		ESTIMATED ANN. INCOME
		VALUE ON MAY 31	%	VALUE ON JUN 30	%	
	<b>ASSETS</b>					
	Cash and sweep balances	-126,979.70	0.00	752.07	0.59	2
	Stocks, options & ETFs	0.00	0.00	0.00	0.00	0
	Fixed income securities	127,008.89	100.00	126,984.76	99.41	2,223
	Mutual funds	0.00	0.00	0.00	0.00	0
	<b>Asset value</b>	<b>\$29.19</b>	<b>100%</b>	<b>\$127,736.83</b>	<b>100%</b>	<b>\$2,225</b>

Negative values are not included in percent calculations.



WELLS  
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**SNAPSHOT**  
**Current period ending June 30, 2018**

ACCOUNT NAME:

THE HYMAN AND HELEN MARKS REVO  
C/O LAWRENCE MARKS TR  
LAWRENCE MARKS TTEE ET AL  
U/A DTD 10/15/2016  
*Stephen Marks*

ACCOUNT NUMBER: **██████████**

Your Financial Advisor:  
RICHMAN(GROSS  
Phone: 917-351-2000 / 800-223-0610

ONE PENN PLAZA  
27TH FLOOR  
NEW YORK NY 10119

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**NO BANK GUARANTEE**

**MAY LOSE VALUE**

WELLS  
FARGO

ADVISORS

## SNAPSHOT

THE HYMAN AND HELEN MARKS REVO  
C/O LAWRENCE MARKS TR

LAWRENCE MARKS TTEE ET AL, *Stephen Marks*  
U/A DTD 10/15/2016

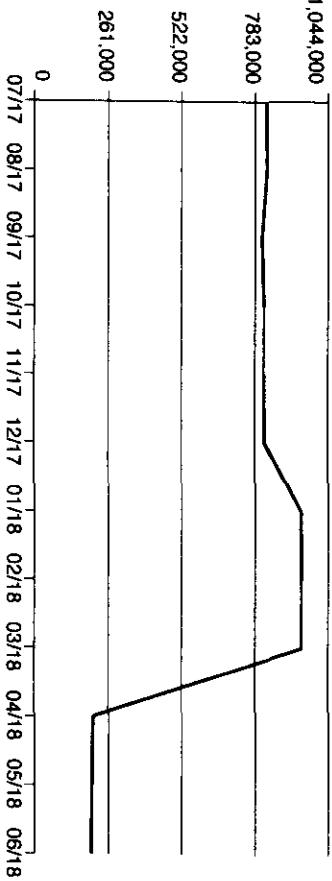
JUNE 1, 2018 - JUNE 30, 2018  
ACCOUNT NUMBER: [REDACTED]

Page 1 of 7

### Progress summary

	THIS PERIOD	THIS YEAR
Opening value	\$203,381.78	\$815,938.54
Cash deposited	0.00	144,676.76
Securities deposited	0.00	0.00
Cash withdrawn	0.00	-61,681.22
Securities withdrawn	0.00	-696,780.20
Change in value	-1,828.94	-601.04
<b>Closing value</b>	<b>\$201,552.84</b>	<b>\$201,552.84</b>

### Value over time



### Portfolio summary

CURRENT

ASSETS

ASSET TYPE	PREVIOUS VALUE ON MAY 31	%	CURRENT VALUE ON JUN 30	%	ESTIMATED ANN. INCOME
Cash and sweep balances	90,413.78	44.46	90,428.64	44.87	181
Stocks, options & ETFs	0.00	0.00	0.00	0.00	0
Fixed income securities	112,968.00	55.54	111,124.20	55.13	3,780
Mutual funds	0.00	0.00	0.00	0.00	0
<b>Asset value</b>	<b>\$203,381.78</b>	<b>100%</b>	<b>\$201,552.84</b>	<b>100%</b>	<b>\$3,961</b>

